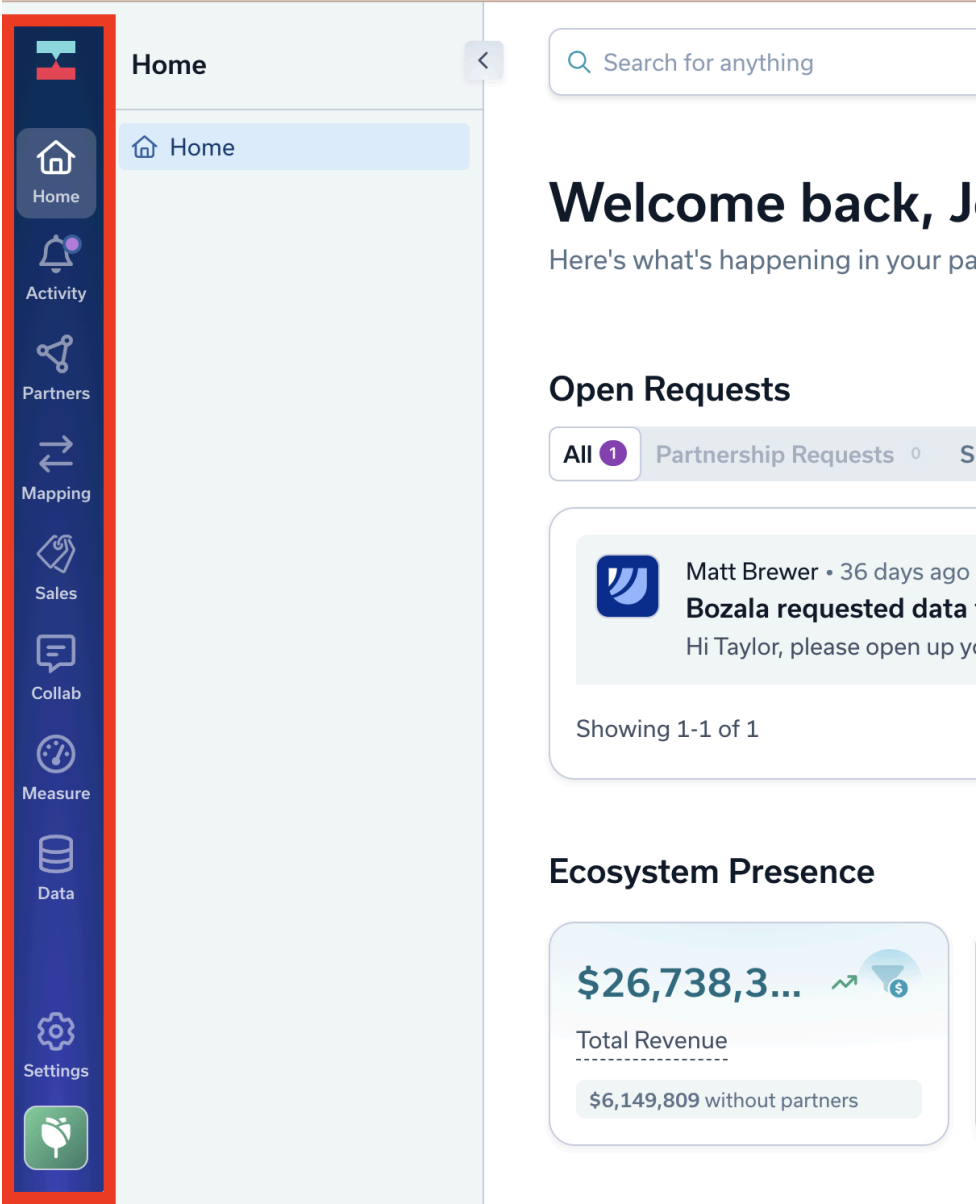


# How to Navigate Crossbeam

How to access everything Crossbeam has to offer.

## Navigation Menu

The left-side Navigation menu includes actions you can take within Crossbeam to manage partnerships and data sharing. When you select an icon, it will open an expanded menu with relevant features to select, and your workspace will reflect the selected feature.



## Home Icon

On the Crossbeam [Homepage](#), scroll the page to explore pending requests, overview of ecosystem insights, sales, account mapping, and Shared Lists activity.

The screenshot displays the Crossbeam homepage interface. On the left, a vertical sidebar contains navigation icons for Home, Activity, Partners, Mapping, Sales, Collab, Measure, Data, and Settings. The 'Home' icon is highlighted with a red box. The main content area features a search bar at the top with the placeholder text 'Search for anything'. Below the search bar, a welcome message reads 'Welcome back, Joy Rudnick' followed by 'Here's what's happening in your partner ecosystem'. The 'Open Requests' section is visible, showing two requests: one from Lauren Berkowitz regarding 'Bozala' and another from Erin Maloney regarding 'Surfzer'. Each request includes an 'Ignore' button and an 'Edit Sharing' button. The 'Ecosystem Presence' section at the bottom shows four metrics: Total Revenue, Win Rate, Opp Size, and Time to Close, each with a corresponding icon and a placeholder value.

Always located at the top of the workspace is the Search Bar. You can use this to find your partners or search new partners and send invites directly from the Search Bar. Next to the Search Bar is your Avatar. Click on this helpful tool to access Crossbeam resource links, including:

- Profile and Preferences
- Crossbeam Academy
- Help Center

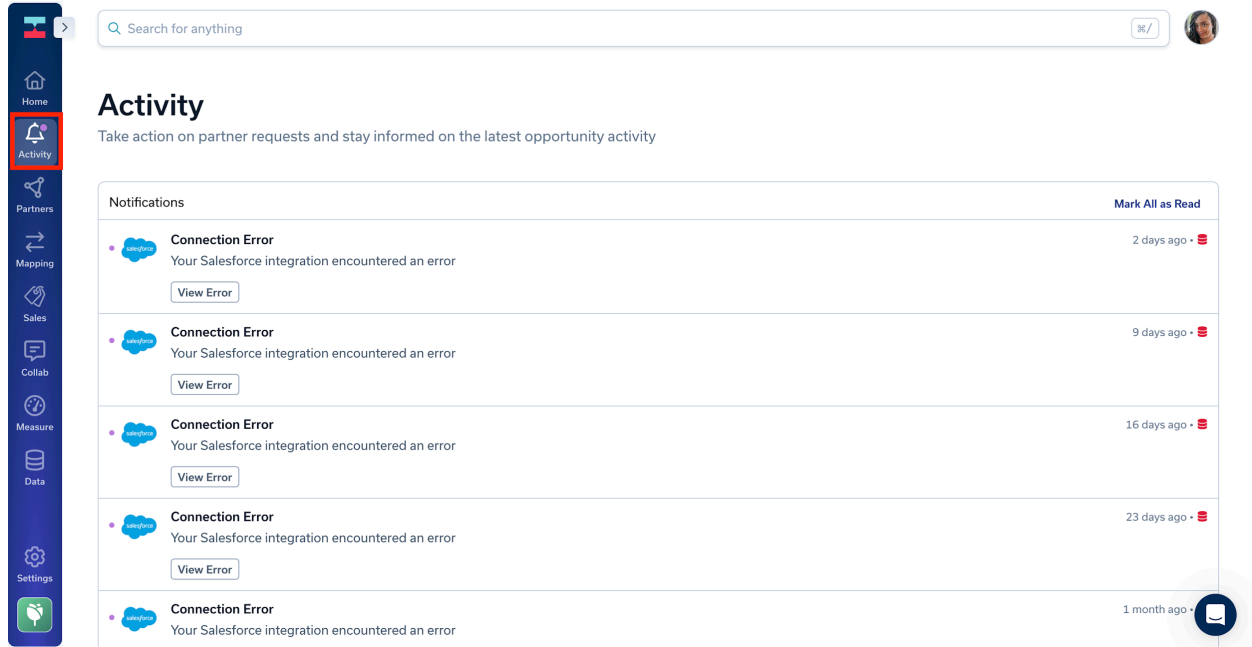
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### Note:

If you are not seeing a certain section of the page - don't fret! This just means you do not have data yet. The Homepage will dynamically update and show partnership ecosystem data as your partnerships advance.

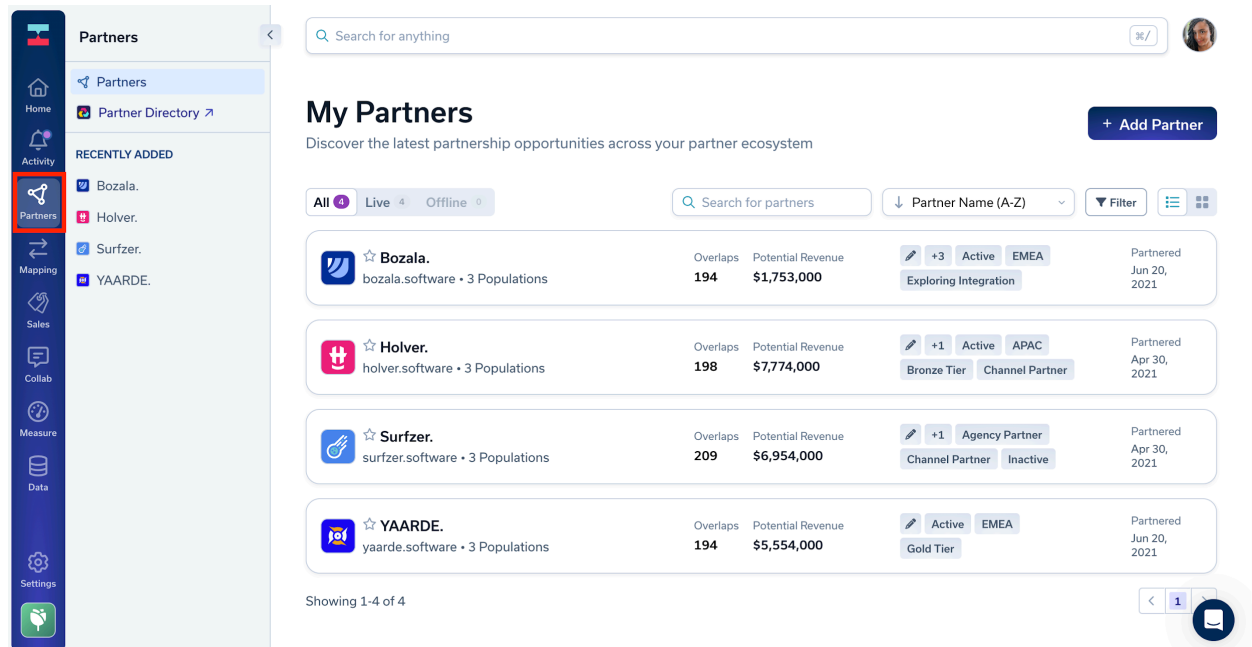
# Activity Icon

Click on the [Activity](#) icon to see the latest activity in your account. Take action on data processing events and stay informed on the latest opportunity activity.



# Partners Icon

View existing Partnerships and Partnership Requests by clicking on the [Partners](#) icon. This workspace provides a general view of Overlaps, Potential Revenue, Tags, and date the partnership was established. Click on a Partner to see details on the partnership.



## Mapping Icon

The [Account Mapping](#) workspace allows you to create reports and compare data with your partners to find strategic opportunities to work together.

The screenshot shows the 'Account Mapping' workspace. On the left is a vertical navigation menu with icons for Home, Activity, Partners, Mapping (highlighted with a red box), Sales, Collab, Measure, Data, and Settings. The main content area has a search bar at the top and a 'Create Report' button. Below the title 'Account Mapping' is a subtitle: 'Compare data with your partners to find strategic opportunities to work together'. There are six report categories: 'Single Partner' (Get actionable insights about the state of individual partnerships), 'Pipeline' (Leverage Potential Revenue to uncover the highest ROI opportunities), 'Greenfield' (Discover all non-overlapping accounts with partners), 'Partner Tag' (Track and measure insights by partner tag categories), 'Ecosystem' (See a 360-degree ecosystem landscape with an all-partners view), and 'Custom' (Slice and dice your data with a custom build). Below these is a 'Recommended Reports' section with two entries: 'YARDE.' (Recommended co-selling opportunity based on overlapping opportunity data) and 'Surfzer.'.

## Collab Icon

Collaborate with your partners on a specific account with [Shared Lists](#). Partner Managers and sales leadership can collaborate in real-time within Crossbeam through Shared Lists.

The screenshot shows the 'Collaborate' workspace. The left navigation menu has 'Collab' (highlighted with a red box) selected. The main content area has a search bar and a 'Create List' button. Below the title 'Collaborate' is a subtitle: 'Swap accounts with your partners to build new relationships and make better introductions'. There is a 'Recent' section with a 'Recently Updated' tab and an 'Activity' tab. It lists three shared lists: 'Mutual Open Ops for demo' (4 records, last updated 5 days ago), 'CrowdBlossom & Holver- Amanda testing' (4 records, last updated 14 days ago), and 'demo test list' (39 records, last updated 22 days ago). At the bottom, there are filters for 'All' (22), 'Your Lists' (0), and 'Shared with You' (0).

## Sales Icon

When you select the Sales icon, you can manage [Crossbeam for Sales](#) and open the external link to work directly in Crossbeam for Sales.

The screenshot shows the 'Sales' icon highlighted in the left-hand navigation menu. The main content area displays a 'Great job!' message indicating no messages require immediate action. Below this, the 'Messaging' section shows a table with columns for REQUEST, YOUR ACCOUNT, PARTNER MANAGER, CREATED, and ACTIONS. The table is currently empty, displaying a 'Your queue is empty' message with a checkmark icon. The bottom of the page shows pagination controls for 'Showing 0-0 of 0' items.

## Measure Icon

Click on [Measure](#) icon, click on Ecosystem from the side panel to see your Ecosystem, or click on Attribute to attribute revenue to your partners and identify key partnerships.

The screenshot shows the 'Measure' icon highlighted in the left-hand navigation menu. The main content area displays the 'Ecosystem' dashboard, which provides a comprehensive look into the ELG engine. The dashboard includes a section for 'Ecosystem Presence' with four key metrics:

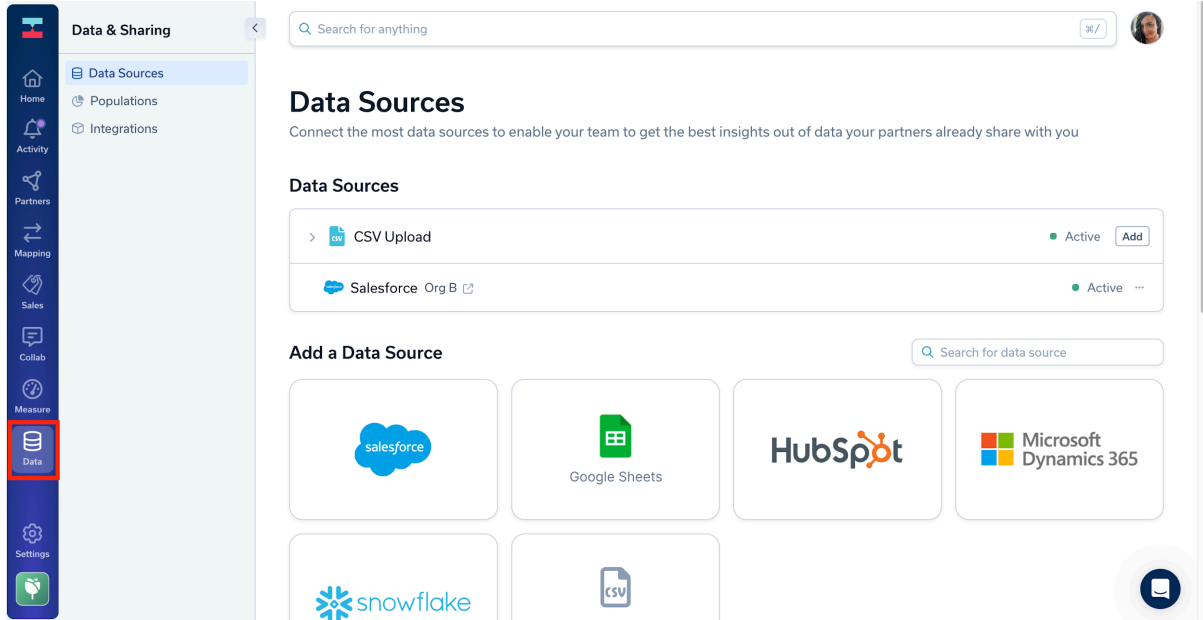
Metric	Value	Change
Total Revenue	\$26,738,3...	↗
Win Rate	45.00%	↗
Opp Size	\$65,000	↗
Time to Close	60 days	↗

Each metric includes a comparison to performance 'without partners'.

Below the metrics, there is a section for 'Partners' Recent Customers' with a sub-header 'Co-sell with your partners on these potential opportunities'. The bottom of the page features a printer icon and a chat icon.

# Data Icon

Data & Sharing can be located under the [Data](#) icon. From the expanded side panel, click on Data Sources, Populations, or Integrations to explore these features.



# Settings

Access the [Settings](#) icon to update Organization Settings, change your Team Roles, review your Plan & Billing settings, explore Overlaps, and adjust your Profile & Preferences.

